DOCUMENT RESUME

ED 351 585 CE 062 487

TITLE	Reading/Writing Survival Skills for Hospital Staff.
INSTITUTION	Mercer County Community Coll., Trenton, N.J.
SPONS AGENCY	Office of Vocational and Adult Education (ED), Washington, DC. National Workplace Literacy Program.
PUB DATE	92
CONTRACT	V198A10206
NOTE	49p.; For related documents, see CE 062 480-501.
PUB TYPE	Guides - Classroom Use - Instructional Materials (For Learner) (051) -- Guides - Classroom Use - Teaching Guides (For Teacher) (052)
EDRS PRICE	MF01/PC02 Plus Postage.
DESCRIPTORS	Adult Education; Adult Literacy; Adult Reading Programs; Basic Skills; Business Correspondence; *Functional Reading; Hospital Personnel; *Reading Comprehension; *Reading Instruction; Reading Rate; *Reading Skills; Reading Strategies; Recordkeeping; Retention (Psychology); Supervisory Training; Vocabulary Skills; Word Recognition; Word Study Skills; *Writing Instruction; *Writing Skills; Writing Strategies
IDENTIFIERS	*Workplace Literacy

ABSTRACT

This document offers materials for a 16-hour course on reading and writing tasks performed by front-line hospital supervisors who have a high school education. The course was part of a workplace literacy project developed by Mercer County Community College (New Jersey) and its partners. The document begins with an explanation of the project, a rationale for the course, and a course outline that includes objectives, a topical outline, and a textbook reference. Next come materials for two modules on writing ("Creating the Short Document" and "Creating Reports, Proposals, Feasibility Studies, and Longer Documents") and two modules on reading ("Adaptive Reading Techniques: Introduction and Application" and Reading for Recordkeeping"). Included for each of these modules is information on the modules' career benefit, goal, objectives, topics, teaching methods, and method of evaluation. For the writing modules, there are also procedures for the teacher, exercises for learners, and some handouts. (CML)

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READING/WRITING SURVIVAL SKILLS FOR HOSPITAL STAFF

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CE 062487

Prepared Under a United States Department of Education National Workplace Literacy Program Grant to

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OVERVIEW OF WORKPLACE LITERACY PROJECT

Skills for Tomorrow, NOW

The Workplace Literacy Project resulted from a Department of Education grant, plus in-kind contributions from a partnership with General Motors Inland Fisher Guide Plant, Princeton Plasma Physics Laboratory, and St. Francis Medical Center. The project is an attempt to find solutions to the growing "skills gap" in industry today. More than 25 million Americans cannot read the front page of a newspaper. In addition, workers whose average ages are rising, must produce in a technological environment that may not have existed when they began working. This lack of knowledge makes it difficult to compete in a technologically changing workplace. Moreover, an increasing number of immigrants have entered the workforce with limited English communication skills. In response to this growing need, the Federal government provided a grant to Mercer County Community College and its partners to develop ways to enrich and expand employees' basic workplace knowledge. The aim of the project was also to improve the self-esteem of the participants.

Support for the project was solicited from all levels of company management and the unions. In addition, an advisory council, comprising key management and employees from each company determined the design, goals, and time-frame of the project. Each company provided a liaison person from their site, and MCCC hired a director to manage the program. Employee release time for classes was site-specific.

Participation in the program was voluntary. Information about classes was disseminated through company letters, flyers, union notices, notices included with paychecks, and open forums with supervisors and employees.

The ABLE test was used for normative pre and post testing. Other types of evaluations varied from course to course. MCCC counselors met with each student to discuss present and future educational objectives.

Courses were offered in reading, business writing, math, science, and English as a Second Language. In addition, there were workshops in problem solving, stress management, and other work survival skills. The curricula for the courses were customized for each worksite to be as job focused as possible.

It is our hope that this program will serve as a model for other organizations to empower their employees with the skills needed to succeed in the changing technological workplace, today and in the future.

Overview of Reading and Writing Modules Offered by MCCC and St. Francis Hospital

Why are we doing this? Participants in the reading and writing seminars offered already can read and write. Most grit their teeth, wade through reports, and produce a fair version of what they've read in memos and proposals that their colleagues then grit their teeth and read because they must. Little is done without frustration. Much is done without effectiveness.

A 1982 survey showed that 92% of corporations responding cited communication skills as the most sought after quality in job applicants.

A 1991 survey of newspaper readers showed that most do not read the entire paper. Few read more than the first paragraph of any article and some read only headlines. Without practice, reading and writing are frustrating tasks. Vague unfocused writing is ineffective on-the-job writing. Reading without first establishing a clear purpose is wasted time and lost knowledge.

A visit to commercial bookstores, college English departments and developmental reading labs prove that mnemonic devices and shortcuts to understanding complex reports or policy manuals do not exist for the "executive" reader. No site-based or business world orientation is given to the study skills ordinarily passed over lightly in high school or college, where they are ignored for their "lack of relevancy" to the "real" world. It is an unfortunate irony.

Writing for the professional world receives more attention. In text after text, the need for clarity, a natural voice and elimination of jargon is stressed. Competency in writing is linked to efficiency and productivity in business. The implication is that competency is lacking. The reading and writing modules offered at St. Francis Hospital address the need for a relevant approach to participants with site-based materials and practice. The goal is to produce effective communicators who find ways to write quickly, powerfully and clearly, and read without frustration and the need to constantly reread to remember.

COURSE OUTLINE

READING AND WRITING MODULES

This course is aimed at making job related reading and writing tasks easier and more effective in a hospital environment. The targeted audience is front line supervisors with high school degrees who want to sharpen their skills in order to advance their careers.

OBJECTIVES

Upon completion of this course, students will be able to:

- Write short documents requested on-the spot clearly, accurately and in a well organized manner
- Write clear, interesting, and accurate reports and proposals quickly and without frustration
- Read with a purpose, with greater speed, comprehension, and retention of important material
- Use more than one note-taking or record keeping technique and generate written documents from notes

TOPICAL OUTLINE

- Writing
  - four step writing process
  - awareness of audience
  - elements of clear style
  - avoiding common errors
  - write and evaluate samples
  - identify parts of longer documents
  - analyzing relevance of data
  - setting priorities
  - relating form to purpose
  - persuasive writing
- Reading
  - thought clusters, previewing, PQ3R, skimming
  - six functions of paragraphs
  - word attack skills
  - retention, recall, recognition
- Record keeping
  - Text marking, note-taking, Blader flowchart
  - "Tickler" file system and document file

OTHER

16 hours

TEXTBOOKS

Brock, Susan L., Better Business Writing, Crisp Publications, Inc., California, 1987.
Dumain, Deborah, Write to the Top: Writing for Corporate Success, Random House, New York, 1983.

Writing Module 1: Creating the Short Document

Career Benefit: Participants will learn to write clearly accurately and with energy in short documents requested on-the-spot. This two session seminar will help participants plan, create and revise their writing quickly. Common pitfalls, (cliches, jargon, vagueness, and wordiness), will be discussed and remedies provided. Greater effectiveness in writing through awareness of the writer's audience is stressed.

Note: Participants are asked to bring samples of short documents, (memos, letters, announcements), they most frequently write.

Goal: After completing Module 1, participants will be able to create on-the-spot memos, letters, or other short documents that are well organized, clear and effective.

Objectives: Participants in Module 1 will:

1. Understand a four step writing process, (prewriting, rough draft, revising, editing).

2. Develop an awareness of audience and its impact on the form and diction the writer chooses.

3. Generate individual samples of memos or letters applying the writing process.

4. Assess their strengths and weaknesses as writers using guidelines to revision and editing.

5. Practice the elements of a clear style:
   - Effective word choice (diction)
   - Specificity
   - Economy
   - Active voice

6. Evaluate models for qualities of good writing, suggesting revision for poor passages.

Content Outline (for two sessions)
Module 1: "Creating the Short Document"

1. Producing participant writing samples of memo and letter

2. Introducing the Writing Process
    - Prewriting
    - Rough Draft
    - Revising
    - Editing

3. Establishing impact of audience on diction and persona
    - What is the "personality type" of the audience?
    - What is the proper, most effective, approach and form?

4. Generating individual samples of letter and/or memos employing the writing process
    - Conveying bad news tactfully
    - Advising of changes
    - Clearing up confusion
    - A letter to persuade
    - The natural voice

5. Practicing revision to avoid the fog zone
    - Wordiness
    - Redundancy
    - Condescending statements
    - Sexism
    - Negativity
    - Passive Construction
    - Lack of commitment

6. Practicing editing to avoid common errors
    - Mechanics (parallel construction, pronoun-antecedent agreement)
    - Spelling
    - Punctuation
        - Commas
        - Semicolons
        - Colons
        - Apostrophes

Usage

7. Producing exit sample demonstrating all steps of the writing process

Module 1: Creating the Short Document
Teaching method

Each session will involve individual and group participation. Participants will write in order to gain better knowledge of the writing process and to develop an awareness of their own individual method, their good and bad habits. They will apply revision and editing techniques to their own work. Brief conferences will allow the writer to gain a greater awareness of audience, the need for purpose, clarity and vitality in writing.

Tools in the form of flowcharts, prewriting techniques, spelling and diction reminders, and pitfall reminders will be offered. Models of good and bad writing will be examined and editing skills will again be practiced.

Method of Evaluation

The method of evaluating the effectiveness of Module 1 will be the exit sample written using the techniques introduced in the module. The final draft will be compared to the entry sample written early in the first session of Module 1.

Writing Module 2: Creating Reports, Proposals, Feasibility Studies and Longer Documents

Career Benefit: Participants will learn how to organize technical data, anecdotal records or facts from various sources and create readable analytical or persuasive reports and proposals. This two session seminar will review rules of good writing and help participants establish the purpose for writing as the organizing principle in a document. Models to learn from will be examined and a "can't fail" outline sequence for persuasive writing will be practiced.

Note: Participants are asked to bring samples of longer documents, (reports, studies, proposals), they most frequently write.

Goal: After completing Module 2, participants will be able to write clear, interesting and accurate reports and proposals quickly and without frustration.

Objectives: Participants in Module 2 will:

1. Understand the four step writing process, (prewriting, rough draft, revision, editing).

2. Identify parts of longer documents, (introduction of purpose, supporting detail, conclusion).

3. Analyze relevancy of data and set priorities.

4. Relate the form of a document to its purpose.

5. Develop an awareness of audience and its impact on persona and diction.

6. Practice the elements of a clear style:
   - Effective word choice (diction)
   - Specificity
   - Economy
   - Active voice

7. Use Brock's "Motivated Sequence Outline Model" for persuasive

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writing.

8. Write a persuasive proposal.

Content Outline (for two sessions)
Module 2: "Creating Reports, Proposals, Feasibility Studies, and Longer Documents"

1. Sharing of steps used by participants to create longer documents

2. Introducing or reviewing the writing process
   - Prewriting
   - Rough Draft
   - Revising
   - Editing

3. Reviewing parts of any report
   - Introduction
   - Statement of purpose
   - Supporting details
   - Effective conclusion

4. Introducing strategies for organizing data prior to writing
   - Notecards
   - Flowcharts
   - Mapping
   - Clustering

5. Studying suitable document language
   - When to be objective
   - When to be subjective
   - Rules of good writing
   - Deadening pitfalls
   - Use of Quotation
   - Eliminating the "as you know" (already familiar)
   - Attribution
   - Journalistic brevity
   - Syntax
   - When to break rules

6. Establishing clarity of purpose and the natural voice

7. Practicing writing of "come hither" introductions and conclusions that linger

8. Introducing Brock's Motivated Sequence Outline Model for persuasive writing

9. Creating a proposal using the writing process and prewriting techniques

Module 2: Creating Reports, Proposals, Feasibility Studies and Longer Documents

Teaching Method

Through discussion, sharing of individual methods and review of samples, participants will analyze their process in creating reports and proposals. Methods of organizing data and introducing the purpose for writing will be practiced. Introductions that establish purpose and excite reader interest will be practiced. Participants will practice writing effective conclusions.

Individual and group revision and editing will be practiced on models provided in order for participants to grow more alert to vagueness, jargon, common grammatical and spelling errors.

Method of Evaluation

Since it is unrealistic to ask participants to compose a technical report or feasibility study on the spot, a persuasive proposal for a change or improvement in work site conditions, using the the Motivated Sequence Outline Model will serve as the evaluation document. Using group prewriting techniques, (discussion, debate, brainstorming, mapping or clustering), and individual use of the model, participants will each create rough drafts of the proposal and practice revision and editing on the draft.

Reading Module 1: Adaptive Reading Techniques: Introduction and Application

Career Benefit: How often we put down a complicated document, or important memo, and find we haven't any idea what we've read. We've merely exercised our eye muscles and wasted valuable time. Participants in this seminar will learn to avoid the frustration of plodding word by word through job related reading. They will learn adaptive reading techniques that save time and build flexible reading styles appropriate to varying reading tasks.

Note: Participants are asked to bring samples of reading most frequently required on the job.

Goal: After completing Module 1, participants will understand how they read. They will be able to apply specific adaptive techniques in order to read with a definite purpose, greater speed, retention and recall of job related materials.

Objectives: Participants in Module 1 will:

1. Understand their present reading attitude, habits and comprehension level.

2. Learn adaptive techniques of thought clustering, previewing, PQ3R, and skimming.

3. Apply various adaptive reading techniques to job related reading materials.

4. Identify the six functions of paragraphs.

5. Choose appropriate paragraphs to skim for specific reading tasks.

6. Apply knowledge of affixes and roots to attack of job related vocabulary not revealed in context.

7. Understand the three components of memory, (retention, recall and recognition).

8. Practice techniques to improve retention, and recall.

Sources

Write to the Top: Writing for Corporate Success, by Deborah Dumaine. Random House: New York, 1983.

Better Business Writing, by Susan L. Brock. Crisp Publications, Inc.: Los Altos, Ca., 1987.

Content Outline (for two sessions)
Reading Module 1: "Adaptive Reading Techniques: Introduction and Application"

1. Establishing attitudes towards reading
   - Reading Inventory
   - Vision Survey

2. Taking a comprehension test using the St. Francis policy manual

3. Reading in thought groups
   - Eye fixation and apprehension
   - Practicing thought groups on St. Francis memos
   - Teaming to see if thought grouping increases retention and comprehension with follow-up CLOZE Inventory

4. Learning adaptive reading techniques
   - Preview
     - Creates greater interest
     - Familiarity yields greater comprehension
     - See the big picture
     - Read the title
     - Read the subhead
     - Read illustrations (study) maps, graphs, charts (interpret)
     - Read first paragraph for purpose and tone
     - Read closing paragraphs (summary restatement)
     - Skim through
     - Practicing previewing on St. Francis material

5. Identifying six functions of paragraphs
   - Introduction
   - Definition
   - Illustration
   - Information
   - Transition
   - Conclusion

6. Skimming for facts

7. Practicing dynamic skimming (speed reading)

8. Using PQSR on St. Francis reading materials
    - Preview
    - Question
    - Read
    - Recite
    - Review

9. Developing memory of written material
    - Plan
    - Review
    - Look for principles
    - Schedule memorization last
    - Think about the matter
    - Apply the learning
    - Discuss
    - Use mnemonic devices

Reading Module 1: Adaptive Reading Techniques: Introduction and Application

Teaching method

Adaptive reading techniques are useful only as they are practiced. Participants will engage in comprehension checks and reading rate checks. Practice for each technique listed in the course outline is planned. By seeing their own improvement, motivation to use the techniques after the seminar ends is heightened.

Individual and group participation, as well as teams for friendly competition, are all anticipated methods of reaching the participants.

Graphic data, specific word lists and easy to read reminders of each facet of the adaptive reading seminar will be distributed for participants to help them continue becoming proficient flexible readers.

Method of Evaluation

The method of evaluating the effectiveness of Reading Module 1 is in feedback from participants as to the usefulness of each technique. In addition, assessment of progress on CLOZE Inventories, thought group readings and informal comprehension checks administered with each new adaptive reading technique will take place.

Reading Module 2: Reading for Record Keeping

Career Benefit: Much of the reading St. Francis front line supervisors do is disseminated in memos and reports to other employees. Some of the reading completed may be filed and returned to at a later date. To reread in order to remember the contents is boring, frustrating and a waste of energy. Participants in Module 2 will learn various note-taking, record keeping techniques to serve as prewriting for memos and reports, while eliminating the time consuming frustration of rereading. Learn to break it down, take it down and find it fast.

Note: Participants are asked to bring samples of job related reading they frequently must do.

Goal: After completing Module 2, participants will be able to use more than one note-taking or record keeping technique and generate written documents from notes.

Objectives: Participants in Module 2 will:

1. Review or learn adaptive reading techniques of previewing, PQ3R, and skimming.

2. Review or learn six functions of paragraphs.

3. Learn record keeping techniques of text marking, note-taking, and Blader flowchart.

4. Apply record keeping techniques to job related reading.

5. Generate written documents from at least one record keeping technique.

6. Learn to develop a "tickler" file system and "tickler" document file.

Content Outline (for one or two sessions depending on whether participants attended Reading Module 1)
Reading Module 2: "Reading for Record Keeping"

1. Reviewing adaptive reading techniques of previewing, PQ3R, and skimming

2. Reviewing six functions of paragraphs

3. Sharing techniques of both reading and notation currently used

4. Introducing text marking
    - Summarize
    - Underline
    - Bracket
    - Star
    - Enumerate
    - Abbreviate
    - React
    - Practice on job related reading

5. Note-taking
    - Readings and Statements
        - Record
        - Rephrase
        - Practice on job related readings

6. Reviewing writing process
    - Prewriting
    - Rough draft
    - Revision
    - Editing

7. Introducing Blader reading record/prewriting flowchart
    - Practice use
    - Apply technique to produce memo

8. Introducing how to keep a tickler file and tickler document file.

Reading Module 2: Reading for Record Keeping
Teaching Method

Hands-on practice of each technique using job related readings is essential if participants are to use the techniques after the seminar. The seminar will be a lab with participants expected to suggest revision or further adaptation of the record keeping techniques offered.

To a degree, the seminar will serve as a share session, allowing participants to review reading/note-taking techniques most applicable to their job.

Method of Evaluation

The quality of documents produced using methods introduced and feedback from participants as to the usefulness of information and ideas presented will measure the effectiveness of the seminar. An evaluation survey will be asked for as closure for the seminar.

Procedure: Creating the Short Document

1. Introduction to the Writing Process
   Antifreeze to engine in a 10 minute writing
   Explain the process of freewriting
      don't stop/don't let internal critic interfere/don't lift pen from paper/no need for complete sentences
      a freewriting from p. 27 of Dumaine is helpful to read

Focus topic for freewriting: Nearly everyone has a suggestion, simple or complex that would improve some condition of their workplace. It can range from buying a better coffee machine or allowing compatible teams to always work together. What is your suggestion?

Possible fallback topic: Write about the greatest "stressor" on your job.

2. On notecards, have participants list ways they use writing on the job, [types of writing is what is meant] Share.

3. From Brock, allow participants to fill out her 'Self-assessment" p. 3 Go over the self-assessment, especially the question of audience. "Do I consider my audience?"

4. List the steps in the writing process on the board: prewriting, drafting, revising, and editing. Define these steps Add to them the consideration of audience.

Audience: Who do you write for? What do you write to them for? How well do you know them? How much do you plan for them? Reader-centered writing is successful writing. If you want their attention and action, then the writing must have clarity and power.

[One of reasons corporations demand good writing skills because there is high correlation with ability to think well analyze info., weigh alternatives, make decisions.]

5 Participants should go back to their notecards for the ways they use writing on the job. Next to each way, they should write who their audience is for each job.

Have you ever considered them as individual readers before?
Do you have different types of audience?

Participants should turn their cards over and write the personality traits of members of each of their specific audiences. After the description of each type of audience, participants should discuss the most effective way to communicate with that type of audience. **This is an opportunity for brief group communication and collaboration with results being shared with the larger group.**

Instructor input: Think in terms of facts, thoroughness of detail, the human touch etc.

6. Instructor should distribute the personality type definitions found on p. 4 of Brock. Read/share/add additions/discuss implications

7. Distribute the Audience Focus sheet as a writing tool, (p. 10 Dumaine) Go over some potential answers to: Why am I writing this? Probe for:

Persuade analyze explain request motivate recommend report findings respond praise inform propose announce send bad news

Participants should look over their initial 10 minute freewriting and find a specific purpose in that writing. Naturally, because it was a free writing, they may find varied purposes as they went from paragraph to paragraph.

Discuss the "Bottom Line" section of the Audience Focus sheet. Define the bottom line as one or two sentences that are specifc about the writing task. "Why am I writing this?" "What action do I want taken as a result?" "What do I want my reader to understand after they finish reading this?"

8. Begin going into the writing process in more depth.

Begin with prewriting techniques: show how freewriting can be used as a prewriting technique. Ask group to look at their own prewriting and circle what they might include in a memo to a colleaque asking for consideration of your idea for a change. Then ask them to number the circled items in a sequence they might use to reach a particular audience successfully.

Mention outlining as a prewriting technique.

Teach Questioning technique of prewriting: Write out questions readers will need answered about your topic: background, requirements,

features, benefits, changes, costs, alternatives, timing.

Write complete answers to the questions you ask. You can always cut them down. If you can't answer, you know you need more research.

Example for group to try: Imagine you have to send a memo with a dual purpose: 1) to announce a very important meeting to discuss phone bills that are excessive to be attended by a supervisor and one representative to be chosen from each department.

2) to announce a new policy in effect before the meeting, that no personal phone calls can be made unless the caller has a phone calling card, or unless the call is an emergency. Emergencies must be cleared with a supervisor. In addition, all employees, regardless of rank, must fill in a phone log sheet, listing the number called and the nature of the call and the time begun and ended.

Encourage the group to use the questioning technique to prewrite for this memo: Example of questions group should ask:

What will be on the agenda?
How can I prepare?
Do I have to go?
What if I can't go
Etc.

Questions are easier to ask if you've nailed down your audience and the way you can best be clear to them.

Answer the questions. Have the group share their responses. Which are best asked and answered/

Put them in order.

9. Teach mapping/clustering/brainstorming techniques. Demonstrate on board, drawing bubble large enough for about seven to ten words. Put key idea in center. Draw stems out from bubble and jot down all the categories or ideas you feel need to be addressed in the memo. Prioritize by numbering the stems. Use focusing questions for determining the audience.

Participants should use any technique that they are comfortable with and try drafting the memo. The attempts should be handed in in whatever stage they are for the instructor to work with for the next session.

10. Introduce headlining be showing a memo from Dumain written with and without headlining. [Dumaine - p. 37, 38]

Advantages to headlining: Reader has clear perspective thanks to white space and bullets.

Ideas leap off page, and reader can skim to relevant information

Can be used in letter writing

Note: Instructor used mapping technique with group participation to "break the ice" for participants and encourage them to use a new technique. In the course of the brainstorming, it was clear that participants would use jargon, threatening tone, impersonal "computer language" to convey the negative news in the memo. This was in contrast with the personal speaking voices of their earlier freewriting. A discussion ensued about ways to convey negative news, (see worksheet "Conveying Negative News Tactfully" and "Rewrite These Sentences More Positively") Participants were then asked to go on on their own to develop the memo. Use of the headlining technique was encouraged but was not tried by any participants.

End of Session One

Rewrite these sentences in a more positive way.

1. This letter isn't up to our standards.

2. If you don't improve your attendance record, you won't be promoted.

3. Without careful preparation, we won't be able to win the account.

4. It would not be objectionable if you attended the workshop in the fall

5. We hope you will not be disappointed with the results.

6. Without proper planning, we will not be able to prevent overcrowding.

7. We are sorry, but we cannot process your order until you say exactly why you need new supplies.

8. If you don't like my suggestions, please contact me.

9. People are being allowed to violate visiting hour rules.

10. The paperwork was so sloppily done that the reports were useless.

Conveying Bad News Tactfully

Note the difference between the following positive and negative phrases:

NEGATIVE	**POSITIVE**
You failed to notice	May I point out that
You neglected to mention	We also can consider
You overlooked the fact	One additional fact is
You missed the point	From another perspective
If you persist in	If you choose to
I see no alternative but	Our clear plan of action

Generally, a memo to correct anyone's behavior is more effective if the word "you" is avoided. It is accusatory when it is overused. **Remember**: even when saying "no," be direct and clear. Don't offer false hope or hide the bottom line in complicated jargon.

Session Two Seminar 1: Creating the Short Document

Note: Instructor took all starts on the memo about phone use and noticed the difference between the language of freewriting, simple, clear, with an obvious desire to reach an audience, and compared it with the foggy, halting, jargon-laden language of the memo beginnings and wrote two memos to the participants using the techniques taught in the last session. It is strongly advised that any teacher of this seminar model the writing being taught for the group.

1. Review
   - Writing Process
     - Four stages taught
     - Why bother? For audience. to produce Reader Centered Writing
   - Prewriting techniques
     - Freewriting
     - Questioning
     - Mapping
   - Importance of focusing on audience types:
     - Thinker
     - Feeler
     - Intuitor
     - Sensor as well as on message

   When audience is mixed, tone should be neutral, non-sexist, not condescending. Rule of thumb: Think the best ofyour audience. Respect them in your writing. Choose the friendly informal tone, and organize your facts clearly and carefully.

   Review facts in phone memo, and prewriting done to organize it.
   Review headlining technique in production of writing.

2. Here is what you showed me:

   Go over the Self-assessment inventory handed in with memos at end of session 1.

   Note: in this group, 5 of 9 participants said they "always think of audience" when they write. Seven of 9 don't know or know they don't recognize business cliches and jargon.

Four of 9 don't edit what they write and 7 of 9 are not confident they communicate persuasively.

Discuss why freewriting was so effective. First, share pieces of freewriting that is not personal or embarrassing.

Ask: Why? Probe for: Knowing audience, i.e. oneself, is receptive. Didn't talk down to self. Wrote naturally. A person was speaking and was relaxed and friendly, thoughtful and clear, got to the point.

Share Dumaine, p. 90, for a good example of a personal memo asking to more office space in natural voice, making point clearly and simply, but not unimaginatively.

3. Something changed in memo attempts: Tell group you will not tell them, but ask them to tell you what changed. Before giving participants copies of their work typed up without names, and using only relevant fragments, give all participants copies of the instructor written memos.

4. I wrote you a memo using headling technique about my second thoughts about the ideas we came up with during the prewriting in the first session:

Go over memo carefully by asking:

1. Where do I use complete sentences?
2. How is it visually arranged for impact?
3. Are there any features of my vocabulary you see? [short simple]
4. Does any sentence confuse you?

Then: Note for group that two sentences are longer than twenty-five words. Sentences should be only 15 - 20 words. Break those two sentences down further. [Sentences begin- "When we discussed..." and "In our concern..."

Put group corrections on board. Discuss reading level. Shortening sentences will lower reading level generally. Fifteen to 20 word sentences will be the 9th grade reading level. The following are various publications and their reading levels:

Mac (computer) Advisor: 7th grade
People Magazine: 6th grade
USA Today: 7th grade
Hemmingway: 4th grade
Word Perfect Documentation Manual: 9th grade

DATE: July 10, 1991
TO: The competent staff attending the "Short Document" seminar
FROM: Bonnie Blader, Teacher
RE: Reevaluating the "bottom line" of the phone use memo

I had second thoughts

When we discussed your prewriting ideas for the phone use memo, we may have gone beyond our desire to get out the three key ideas in the memo. They were:

1. A vital meeting is being held to encourage staff dialogue.
2. Only business calls can be made unless an employee has an emergency, or a phone calling card.
3. All staff will log in business calls.

Where we went wrong

In our concern with "softening" the negative sound of the new "log in" rule, we toyed with the idea of mentioning the effect on patient care. We also mentioned the policy in effect is being ignored.

The problem with that thinking is:

1. We have no evidence of patients being neglected. That assumption subtly targets the staff working directly with patients.
   * Remember they are "feelers" and will note the criticism.
   * If phone calling cards can still be used, we are satisfied with patient care.
2. There is no point in reminding anyone about a policy that is obviously ineffective.

The phone use problem is a financial problem only

The "log" sheets will allow us to see the number of business calls made. Maybe the increase in cost is due to an increase in necessary business phone calls. We can only judge that by eliminating all other non-emergency personal calls for a short period of time.

Note to memo writers: "Writing is architecture, not interior decoration."
"Don't use a long word when a short word will do."
"Headlining in memos works. Do it!"

DATE: July 10, 1991
TO: All staff
FROM: Bonnie Blader, a women totally without authority
RE: Meeting to discuss phone use
Use of log sheets to keep track of business phone calls

An opportunity for dialogue

Our phone bills are much higher than ever before. Last month, the bill was $20,000 more than the same month last year. We need to understand the increase in order to insure all staff can keep using the phones for business and personal calls.

Meeting information

Who: All supervisors and one department representative from each department.
Where: B-3
When: July 30, 1991, 4:00 P.M.

Action requested

1. Contact my office, extension 000, by July 25 to let me know who will attend from your department.
2. If you cannot attend, please call by July 25 to let me know who will attend in your place. Your viewpoint is important.

Until the meeting, a new procedure is being tried

All employees may continue to make emergency personal phone calls. Please notify your supervisor when you have an emergency call to make so we can accurately understand our phone use.

Personal phone calling cards may be used for personal calls outside the local dialing area.

For a short period of time, only local non-emergency personal phone calls can be made without a phone calling card.

Log sheets for business calls will allow us to analyze the phone bill increase

Although we realize it is inconvenient, we ask all staff to use a log sheet, placed by each phone, to allow us to judge our business phone use. The sheets are simple to use, and ask you for the number called and the time the call begins and ends. The sheets will be picked up by supervisors each day.

Discuss how headlines improve memo, drawing attention visually and intellectually to the piece.

Discuss how writing changes when there is commitment and the desire to communicate as a part of the process.

5 Analyze instructor phone memo

Break down overly long sentences: "Although we realize..."

Ask: Have I promised what I can't deliver?

Have I accused?

Have I blamed the change on anyone else?

Have I given "strokes" where I can?

Discuss: The disaffected employee not your concern. Assume the best

Ask: How do captions work?

Where have I used complete sentences?

Note words deliberately left out of the memo: implement employee required maintain must restrict prohibited terminated abuse excessive outrageous comprehend final further measures

Are there other words you now recognize as punitive or jargon I have left out?

6 Distribute student samples and follow this procedure:

Break into groups

Circle what you think can be improved in each sample. Make group decision

Simply, clarify, rewrite as a group until you have made English out of Engfish [redo at least 3]

Be ready to analze the rest with the entire group

7 Stop small groups when you feel they are looking for the right things, are engaging in the revision process, or when the task is finally complete Have large group sharing and discussion based on their ideas

Ask: What happened in these memo starts and why? Encourage dialogue.

Review audience cards participants filled out in session 1. **Note: In the cards, participants clearly understood the personalities and needs of their respective audiences. The instructor must help the participants see that there should be no discrepancy between what they know about their audiences and the way they**

attempt communication with them. The idea that must be accepted by the participants is that the discrepancy did exist when they switched to memo writing from freewriting where they felt they were communicating with themselves, i.e. an interested audience. Discussion should approach the idea that jargon substitutes for authority but is not conducive for promoting action on the job. People do not respond willing to a faceless representative of authority, but try to get around "it." They respond to a voice speaking naturally to them. You don't lose authority by communicating directly. You gain clarity.

8. Distribute Brock's pitfalls of business writing and go over various categories, spending more time and providing more explanation and examples for:

Active voice

Substition list for jargon and cliches [See following]

Instead of	**use**
nevertheless	but
terminate	end
utilize	use
deem	think
assistance	help
converse	talk
forward	send/mail
advise	tell
indicate	show
we would like to ask that	please
for the reason that	because
are of the opinion	believe
for the purpose of	for
prior to	before
despite the fact that	although
in view of the fact that	because
in order to	to
subsequent to	after
with reference to	about
on the occasion of	when
during the course of	during
along the lines of	like

succeed in making	make
make use of	use
have need for	need
give consideration to	consider
initiate or commence	begin/start

Avoiding "no." Accentuate the positive. Suggest what you want rather than what you don't want.

Note: there was not time for the final task that could follow this session, but it is included here for instructors teaching more than a two session module in the future.

Final Task: Use the freewriting you did at the beginning of session 1, and request a meeting with an appropriate person to discuss one of your ideas for improving the worksite. Brainstorm first to decide what to include and how to organize your memo. Use any prewriting technique, (mapping, questioning, etc.) to help you. Write a headline memo using all we have learned about language and organization. Make it short, (one page) and win the right to be heard.

Work to revise the memo yourself. Then show it to a partner and edit or suggest revision for each other's work. Produce a final copy.

Conveying Bad News Tactfully

Note the difference between the following positive and negative phrases:

NEGATIVE	POSITIVE
You failed to notice	May I point out that
You neglected to mention	We also can consider
You overlooked the fact	One additional fact is
You missed the point	From another perspective
If you persist in	If you choose to
I see no alternative but	Our clear plan of action

Generally, a memo to correct anyone's behavior is more effective if the word "you" is avoided. It is accusatory when it is overused. **Remember**: even when saying "no," be direct and clear. Don't offer false hope or hide the bottom line in complicated jargon.

Procedure: Creating Reports, Proposals, Feasibility Studies and Longer Documents

Note: This module is designed for those supervisors who actually do write longer documents. Because the participants who took this module did not write long documents, the prototype procedure for this curriculum has yet to be developed. The material that follows is important for inclusion, but needs teacher designed materials and activities that were not developed during the first run-through of the course. Possibly actual samples of each prewriting technique and many worksite long documents samples would enhance the module.

In addition, any instructor would benefit from having the cooperation of the the supervisor directly responsible for employees who write long documents to be able to target the perceived needs of the writers. The instructor could then help the supervisor develop writing checklists setting out in neutral language what is the writing style objective for specifc projects. These checklists should be based on the most common problems perceived in writing by the supervisor. They should emphasize reader-centered writing. Questions that could appear on a Revision Checklist are:

What will my reader learn from this section if he has no prior experience?

Have I given each section the "what if" test, to see if any questions are left unanswered for my reader?

How have I helped the uninformed reader understand?

Have I provide visual impact to aid understanding of my report in the form of: sidebars, graphs, headlines, bullets, and short sentences?

1. Introduce prewriting, information gathering techniques for longer documents. Show samples where possible. Engage participants in sharing their techniques. Each participant should be equipped with a file box and file cards to enter each technique on a separate card, maintaining a drop file of research techniques for future use.

Prewriting on computer:

Begin with audience focus sheet, (Dumaine), and discuss use

On computer, use data files

Open a new file for each section of report and enter

details

Save each file on the same disk.

Assign similar names for each file that will be part of the same document.

Print a draft of each file or use merging techniques to decide how to fit them together.

Remind participants that before using even computer data files, they should use a brainstorm outline to organize or decide on necessary sections of report.

2. Introduce brainstorm outline.

In center circle, write main goal of report. **Note: Instructor should use a worksite report at this time to dissect and show its component parts. For example, the finished report can be look at backwards with the instructor inventing the brainstorm outline that should have preceded it.**

Main goal of report may be stated as: to persuade.., to report findings..., to analyze..., to request..., to explain..., to propose... etc.

Main categories that may find their way into the report appear on stems radiating out from central circle. Category examples are: costs, background, benefits, implementation schedule, etc.

Fingers radiate from stems, breaking down the category ideas into specific information. For example of the stem for the category "cost" may appear the fingers: training, financing, installation. On the stem labeled "background" may appear the fingers: past practice, current equipment on hand, other places idea has been used.

3. Introduce next prewriting technique of index cards for long reports

The cards gather the "bones" of report and are useful even if writer is not sure of the framework of document.

1. Take all notes on cards, including free-written ideas and insights.
2. Place one idea per card. One sentence per idea is fine.
3. Color code statistical sections which take up more than one card.
4. Spread card on desk and sort into piles on similar topics. Top off each pile with a header card so writer knows general contents by looking at the header.
5. Put rubber band around each stack of cards.
6. Based on headers, choose Method of Development, (sequence)

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Note: Once again, instructor should have prototype report and should have created the card file for participants to see as this info. is given. Participants should be asked to organize the headers and tell why they chose a specific method of development to be followed writing the report.

4 Introduce Post-it Tapes or Notes for long reports

Each idea for outline goes on separate pieces of tape.

Then cover paper with notes or strips of tape 4 to 5 inches long

Use each strip as you would an index card

Fill as many as you need to cover all main points

Experiment with different methods of development by switching the order of the tapes.

Color code the strips for easy organization with colored dot or stripe on the left hand edge of the strip.

Offset subordinate ideas by indenting strips of tape on paper to resemble an outline.

When writer begins to draft, he can write one paragraph for each idea bearing strip.

Note: This technique using the same report as before should also be demonstrated for particpants. Participants should propose alternative methods of development of the report by moving the tapes in an arrangement to form a different outline.

5 Stress to writers that nothing should be done without preparation That preparation must include consideration of the audience to read the report, and consideration of the purpose for writing the report.

6 Pass out Methods of Development info. and discuss fully.

Note that the method of development of most important to least important is the most commonly used and needed It is especially suitable for a receptive audience.

Note that the bottom on the top has more impact than the bottom line at the bottom.

Note that developing from the least important to the most important is useful only when you are afraid that readers will stop at bad news and you need to lay the groundwork first. Sometimes the reader may need "convincers" before the bottom line. Reader's concerns dictate the choice of a method of development. If reader is receptive or unknown, place bottom line on the top If indifferent, bottom line on top also

Methods of Development

The sequence of your ideas is important

Once you have decided what information you should include in a report, memo, letter, or proposal, you have to decide how to develop the material. What is the order of your categories or headlines? Where do you put the key ideas you isolated in your prewriting? Where does the "bottom line" go?

Considerations in your choice of a method

You choose your method of development according to the needs of your reader, your purpose for writing, the nature of your subject and your document, and the way your ideas naturally hang together.

Here are four common methods of development:

#1: Order of Importance

A. Most important to least important

Your headlines	(Categories)
What are our current methods?	(description of situation)
How can we improve them?	(recommendation)
Why do we need this change?	(background/supporting data)
What are the benefits?	(convincers)
Can we implement the change?	(analysis)
What are the next steps?	(action items)

B. Least important to most important

Use when your audience needs convincing

Use: in many writings, especially in memos or reports describing findings or offering important recommendations

#2 Chronology

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Use: Processes, growth statistics, accident reports, trip results, test results, progress reports, manufacturing and scientific procedures, journals, minutes of meetings, planning reports, audit reports, test protocols. OBSERVE CAUTION: STATE THE MOST IMPORTANT IDEA OR RECOMMENDATION AT THE BEGINNING, IGNORING THE TIME ASSOCIATION.

#3 Process

Use: Instructions, descriptions of processes, handbooks, user manuals, procedures, training materials

#4 Analysis

Use: Technical reports, yearly overviews, analyses of trends, annual reports, demographic studies, economic forecasts, financial analyses

<u>One more choice: The Motivated Sequence Plan</u>

One alternate method of development is called the Motivated Sequence Outline. I have given you extra materials explaining that approach. I think it is an effective sequence, and simple to understand. Any proposal you might make to purchase new equipment, or to change the workplace could be introduced with this method. It is also a good framework for an "action plan" which might follow a counseling session. Don't be afraid to adapt or alter the plan to make it work for you.

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Note that a chronological development is used to summarize the history of a product or situation stressing relationship in time: accident reports, progress reports, etc.

Chronological reports should avoid this problem:

Time order may force important materials to appear in an unemphatic place. Unimportant issue may get undue emphasis by being a beginning or end. Solution is to state most important idea or recommendation at beginning ignoring time association. Then shift to chronological development.

Process as a method of dev. is "recipe writing." It does not emphasize time, but emphasizes that facts occured in a particular order.

Analysis takes apart a situation to interpret how and why it develops.

7. Introduce and thoroughly discuss Motivated Sequence Outline Model from Brock. Give participants sample prewriting in the form of notecards, or post-it tape and ask them to prepare a proposal using them in the Motivated Sequence Outline form. Compare the proposals the participants come up with in large group in terms of methods of development, language and have peer revision practiced using the Revision Checklist developed with the supervisor to give participants practice in using revision techniques.

Appendix Module 2: Long Documents

STEP #1: THE FOCUS SHEET

Answer these questions as the first step in any writing task:

1. **Purpose:**
   - Why am I writing this? _____
   - What do I want the reader to do? _____
2. **Audience:**
   - Who is/are my reader(s)? _____
   - What is the reader's role? _____
   - What does the reader know about the subject? _____
   - How will the reader react? _____
   - What is my reader's style? Should I adjust to it? _____
   - How will the reader use this document? _____
   - Whom should I include in this mailing? _____
3. **Bottom Line:**
   If the reader were to forget everything else, what one key point do I want remembered? _____
   _____
   _____
   _____
4. **Strategy:**
   - Should *I* be writing this? At *this* time?
     Would a phone call or meeting be more effective?
   - Should I send this at all? Am I too late?
   - Is someone else communicating the same information?
     Should I check with that person?
   - Should I include deadlines? Actions requested?
   - Is my method of transmission the best? For example, should I be using electronic mail, traditional mail, or fax?

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MOTIVATED SEQUENCE OUTLINE

Specific Purpose: On a separate sheet of paper write a complete sentence stating exactly what you hope to accomplish in your letter. This gives you focus. As you write your letter, remember your specific purpose to keep your message on track.

I. **Attention Step**

A. Overcome readers' apathy

B. Helpful to use illustration, example, etc.

II. **Need Step**

A. Show why change is needed

B. Show why readers need to feel affected by the problem

III. **Satisfaction (of need) Step**

A. State solution

B. Demonstrate that solution is logical, makes sense and is feasible

C. Convince that solution will solve problem

D. Give examples where solution has worked

IV. **Visualization (of future) Step**

A. Show readers what solution will do for them

B. State advantages

V. **Action Step**

A. Convince readers to adopt solution

B. Tell readers specifically what you want them to do

C. Direct readers to act

TYPICAL CATEGORIES FOR COMMON MEMOS & REPORTS, *continued*

SOLVING A PROBLEM

1. Problem description
2. Recommended solution
3. Recommendation justified
4. Background
   - symptoms
   - causes
5. Alternative solutions
   - pros & cons
6. Implementation plan
7. Summary
   - problem restated
   - action requested (restated)

REQUEST TO PURCHASE

1. Overview
2. Recommendation (state what you want)
   - predicted productivity improvements
   - economic advantages
3. Analysis of items in question
   - cost justification
   - depreciation
   - brand selection
4. Implementation considerations
   - timetable
   - plan
5. Staffing requirements
6. Background
7. Summary

REQUEST FOR PROPOSAL

1. Overview
2. Service/item required
3. Background
   - relevant information
4. Possible problems
5. Budget considerations
6. Outline of response needed
7. Deadline for submission
8. Contact person
9. Summary

PROPOSAL

1. Abstract
2. The proposal stated
3. Supporting reasons
4. Plan
   - scope
   - schedule
   - budget
   - implementation
5. Points to investigate further
   - other people involved
   - time factors
6. Conclusions
   - restate recommendation/proposal
7. Summary

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Typical Categories for Common Memos & Reports

Meeting Announcement

1. Time and place of meeting
2. Agenda: a list of topics
3. Speakers
4. Background
   - events leading to calling of meeting
   - what you hope to accomplish
5. Information to consider
6. How to prepare for the meeting
7. Contact/person in charge

Decision-Needed Memo

1. Overview
2. Issue under consideration
3. Recommended action
   - who is involved in the "action"
   - schedule of steps to be taken
   - pros and cons
   - subsequent meetings
4. Background
   - why it became an issue
5. Other decisions/options
   - pros & cons for each
6. Results of study
7. Summary

Status Report

1. Executive summary
2. Project description
3. Current status: progress to date
4. Successful aspects
5. Problems encountered
6. Planned solutions
   - further information needed
   - opinion needed
   - decision needed
   - request for confirmation of plan
7. Other projects completed
   - summary of each
8. Other projects still in progress
   - background
   - status
   - forecast of
     (a) time schedule
     (b) changes
     (c) cost
9. Summary

Performance Analysis

1. Overview (of results)
2. Process or task analyzed
3. Problems detected
   - description of problems
   - possible causes of problems
4. Suggested solutions
   - people involved
   - cost (if any) involved
   - time involved
5. Comparison with previous model
   - similarities
   - differences
6. Dates for changes to be made
7. Date of next evaluation
8. Summary

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